Personnel/Payroll Services Division

VIEWDIRECT USER GUIDE

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General Information 1.0

ViewDirect is an on-line report distribution system. The reports distributed via ViewDirect are immediately available on-line after the reports are produced. Users can access the on-line reports from their workstations. Further, reports can be printed from ViewDirect, if needed.

Please note that the State Controller's Office (SCO) maintains two separate ViewDirect databases. The Personnel/Payroll Services Division (PPSD) ViewDirect database contains personnel/payroll related reports. Because of the confidential nature of the reports in this database, only staff in personnel and payroll offices who meet the security requirements will be allowed access to the PPSD ViewDirect database.

The second ViewDirect database contains Fiscal reports and is maintained by the Division of Accounting and Reporting (DAR). For more information on the Fiscal reports in the DAR ViewDirect database, please visit their website link at www.sco.ca.gov/ard/state/viewdirect.pdf.

Obtaining Access To ViewDirect 2.0

ViewDirect access requires security approval. System access must be requested via the Security Authorization Form, PSD125A, and sent to the State Controller's Office through departmental security monitors.

Each employee requesting ViewDirect access must provide a printer identification number identified in the "Remarks" column of the PSD125A form. Each ViewDirect user is limited to one printer selection.

Reports vs. Enterprise Index Topics

3.0

There are two sections within ViewDirect where reports can be stored and viewed, they are; 'REPORTS' and 'ENTERPRISE INDEX TOPICS'. While all reports are stored in the REPORTS section, some reports are also in the ENTERPRISE INDEX TOPICS. A Complete list of reports currently available can be found in the Appendix Section of this manual.

Following is a brief description of the 'REPORTS' and 'ENTERPRISE INDEX TOPICS' sections:

Reports 3.1

In the Report Section, reports are listed by Report Id (example: BOMRPT1) and Report Name (example: Benefit Over Max Report - SSN Included). Reports that are produced once a month will have one version (such as the Leave Activity and Balances (LAB) report). Whereas, reports produced more frequently will have more than one version (such as the Payroll Warrant Register report). Once a Report ID is accessed, it is broken down by Section (Agency Code). For more information on accessing Reports in ViewDirect, please see Section 6.0, Selecting Reports.

Enterprise Index Topics

3.2

In the Enterprise Index Topics Section, reports are listed by Topic ID (example: PAYREG) and Topic Name (example: Payroll Warrant Register). Once a Topic ID is accessed, it is indexed by key data*. Indexing is necessary when multiple versions of a single report are stored in ViewDirect. Indexing makes it much easier for the user to access a specific report version. For more information on accessing Index Topics in ViewDirect, please see Section 7.0, Selecting Enterprise Index Topics.

Example:

Within ViewDirect, 15 payroll cycles of the Warrant Register report are retained. Placing the Warrant Register report in the Enterprise Index Topic, allows the reports to be indexed by the following key data*: Agency-Reporting Unit, Cycle Date, Issue Date and Type of Payment.

* Key data is specific information found on each page of a given report. In the example given above, each page of the Warrant Register report contains the key data specified, therefore indexing is possible.

Logon Procedures

4.0

ViewDirect can be accessed from the SCO MENU through SCOPROD or SCOVIEW.

	SCO MENU								
NOT	NOTICE: AUTHORIZATION TO ACCESS THIS SYSTEM IS LIMITED TO CALIFORNIA								
		IN THE PROPER CONDI			E BUSINESS. ALL				
ОТН	IER ACCESS IS U	NAUTHORIZED AND UN	ILAWF	UL.					
PF	APPLICATION	CURRENT STATUS	<u>PF</u>	APPLICATION	CURRENT STATUS				
1	SCOPROD	UNKNOWN	2	TSO3	UNKNOWN				
3	3 SCOTRNG UNKNOWN 4 TS1 XDOMAIN								
5	5 PDTSTX UNKNOWN 6 SY2KD4 UNKNOWN								
7	7 8 PSTEST UNKNOWN								
9	9 10 PSTSTX UNKNOWN								
11	PDTEST	UNKNOWN	12	LOGOFF					
13	SCOVIEW	UNKNOWN	14	VIEWTEST	UNKNOWN				
15	SCOVDR	UNKNOWN	16	VDRTEST	UNKNOWN				
	SELECT APPLICATION BY PF KEY								

Figure 4.0

To Log on through:

• SCOPROD 4.1

Use the standard log on procedure and at the blank screen, type REPT and press enter. ViewDirect displays the Viewing Menu shown in Figure 4.1.

REPT	
XXXXX LAST ACCESS AT 13:57:49 ON MONDAY, APRIL 12, 2001	
SIGN-ON IS COMPLETE	

Figure 4.1

-OR-

• SCOVIEW 4.2

Press the PF13 key, or if using a PC, the appropriate keys (example: Shift and PF3 key). The ViewDirect logon screen will appear as follows:

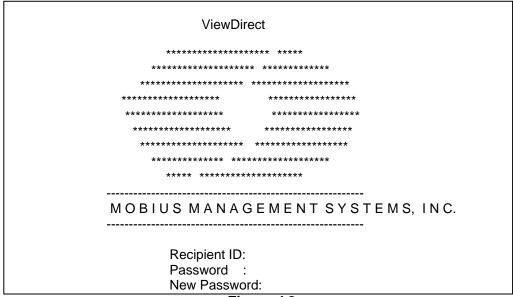


Figure 4.2

Enter your Recipient ID (user id used to log in to SCOPROD) and your password (same as used to log in to SCOPROD). ViewDirect displays the Viewing Menu shown in Figure 5.0.

COMMAND			*ViewDirect*** EWING MENU	TIME: 108	5716		
RECEPIENT ID:			VERSION TAPE VOLS	ON: 6.1 ER: MC6474			
,	VIEW BY REPORT OR TOPIC: R (R/T)						
	REPORT/TOPIC ID: VERSION: SECTION:						
DISPLAY LIST OF REPORT/TOPICS: YES (YES/NO) DISPLAY LIST OF VERSIONS: YES (YES/NO) DISPLAY SECTION INDEX: YES (YES/NO)							
-	-		-	PFOF=RFIND PF11=RIGHT			

Figure 5.0

Report selection begins with the Viewing Menu. On the Viewing Menu you specify whether you want to view a Report (R) or Topic Index (T) (refer to the Appendix for a list of available reports and topics). The following section explains how to access the report and topic options.

Note: The list of reports and topic items that you can access contain only the reports and topics you are authorized to view. No others appear on the list.

Selecting Reports

6.0

If you entered an $\underline{\mathbf{R}}$ in the Access Options field on the Viewing Menu, the following screens will be displayed for report selection:

1. Report Screen

6.1

COMMAN	D	TIME: 105702
		REPORTS
OPTION	REPORT ID	REPORT NAME
х	BOMRPT1 BOMRPT2 LASP904C PDP5711 PDQ0400	BENEFIT OVER MAX REPORT – SSN INCLUDED BENEFIT OVER MAX REPORT LEAVE ACTIVITY AND BALANCES REPORT (LAB) SUSPENDED TRANSACTIONS DAILY ACTIVITY INDEX
PF01=HE	-	NT PF03=END PF04=MENU PF0F=RFIND PF06=MARK NN PF09= PF10=LEFT PF11=RIGHT PF12=QUIT

Figure 6.1

The Reports screen lists the Report ID and Report name of all the reports you are authorized to view. Press PF8 to scroll forward to view more reports. PF7 scrolls back to the previous screen of reports.

To select a report for viewing, type an 'X' in the Option column next to the report you wish to view. Next, press enter and the following screen will be displayed:

2. Report Versions Screen

COMMAN	ID				TIME: 111940	
		F	REPORT VE	RSIONS		
REPORT:	LASP9040	C LEAVE AC	TIVITY AND	BALANCES F	REPORT (LAB)	
OPTION DATE TIME DEVICE STATUS						
	<u>X</u>	20011217	000316	DISK	AVAILABLE	
PF01=HELP PF02=PRINT PF03=END PF04=MENU PF0F=RFIND PF06=MARK PF07=UP PF08=DOWN PF09= PF10=LEFT PF11=RIGHT PF12=QUIT						

6.2

Figure 6.2

The Report Versions screen lists the available versions of the selected report. For example, if there are several days of a daily report available for viewing, the Versions screen lists them in date and time order, starting with the most recent one.

The date is in the YYYYMMDD (year, month and day) format. The time is in the HHMMSS (hours, minutes and seconds) using a twenty-four hour clock, format.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report version for viewing, type an 'X' in the Option column next to the version you wish to view. Next, press enter and the following screen will be displayed:

3. Report Section Index Screen

6.3

Figure 6.3

The Report Section Index screen lists sections available for viewing. The sorting sequence is in ascending order. To select a section, type an 'X' in the Option column next to the section you wish to view and press enter. The system will display the first page of the selected section.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report section for viewing, type an 'X' in the Option column next to the version you wish to view. Next, press enter and the selected report will be displayed. Please see Section 9.0, Viewing Commands/PF Keys for navigating through the report instructions.

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Selecting Enterprise Index Topics

7.0

If you entered a $\underline{\mathbf{T}}$ in the Access Options field on the Viewing Menu, the following screens will be displayed for report selection:

1. Enterprise Index Topic Screen

7.1

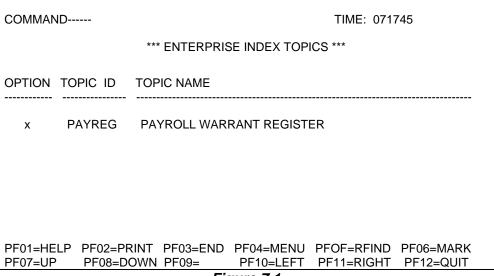


Figure 7.1

The Enterprise Index Topics screen lists the Topic ID and Topic Name of all the topics you are authorized to view. Press PF8 to scroll forward to view more reports. PF7 scrolls back to the previous screen of reports.

To select a topic for viewing, type an 'X' in the Option column next to the report you wish to view. Next, press enter and the following screen will appear:

2. Enterprise Index Topic Versions Screen

COMMAND TIME: 071745							
**	*** ENTERPRISE INDEX TOPIC VERSIONS ***						
TOPIC: PAYREG	TOPIC: PAYREG PAYROLL WARRANT REGISTER						
OPTION DATE TIME DEVICE STATUS							
x 20011031 110550 DISK AVAILABLE							
PF01=HELP PF02=PRINT PF03=END PF04=MENU PF0F=RFIND PF06=MARK PF07=UP PF08=DOWN PF09= PF10=LEFT PF11=RIGHT PF12=QUIT							

7.2

Figure 7.2

The Enterprise Index Topic Versions Screen lists the available versions of the selected topic. For example, if there are several versions (such as multiple payroll cycles) of a topic available for viewing, the Versions screen lists them in date and time order, starting with the most recent one.

The date is in the YYYYMMDD (year, month and day) format. Time is in the HHMMSS (hours, minutes and seconds) using a twenty-four hour clock format.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report version for viewing, type an 'X' in the Option column next to the version you wish to view. Next, press enter and the following screen will appear:

3. Enterprise Index Topic Items Screen

COMMAND	TIME: 104036				
*** ENTERPRISE INDEX TOPIC ITEMS ***					
TOPICID: PAYREG PAYROL	L WARRANT REGISTER				
O TOPIC ITEM	REPORT ID DATE TIME DEV STATUS				
	PAYREGX 030318 194320 DISK AVAILABLE PAYREGX 030320 210704 DISK AVAILABLE PAYREGX 030320 210704 DISK AVAILABLE R PAYREGX 030321 054750 DISK AVAILABLE PAYREGX 030324 200051 DISK AVAILABLE				

Figure 7.3

The Enterprise Index Topic Items screen displays a list of the topic items for the topic version you selected. The items listed on this screen are sorted from left to right in ascending order.

Press PF8 to scroll forward. PF7 scrolls back to see the previous screen. To select a topic item for viewing, type an 'X' in the Option (O) column next to the topic item you wish to view. Next, press enter and the selected report will be displayed. Please see Section 9.0, Viewing Commands/PF Keys for navigating through the report instructions.

Additional Topic Report Information:

Occasionally, the Enterprise Index Topic Items displays '.......' (see example above) in the Topic Item field. This occurs when there is more than one fiscal year for a given Topic Item.

The preceding sections describe how to select a report. The selected report will display the following information:

• Screen Heading – the top three lines contain system information.

Line 1 displays messages from the system. For example, if you press a PF key that is not active for report viewing, the system uses the top line to tell you the PF key does not work on the screen.

Line 2 contains two fields:

- COMMAND, where you enter commands such as the FIND command for searches. See Section 9.0 for a complete list of available COMMANDS.
- SCROLL, which allows the user to SCROLL through the report. See Section 9.1 for scrolling information.

Line 3 contains six fields that provides the: Report ID, Version, Section Code (the section of the report you are viewing), Page, Row and Column.

Viewing Window

The viewing window displays as much of the report as will fit on the screen at one time. The size of the viewing window depends on the type of terminal you are using. Most of the reports in ViewDirect are too large to view on one screen. Therefore, scrolling is necessary to see the full page.

A number of commands are available to help you navigate through a report. Most commands have a corresponding PF Key. The following summarizes the commands and the PF keys, if applicable.

Command	PF Key	Result
H (Help)	PF1	Gives information about Viewing and Printing help
PR(Print)	PF2	Displays the Printing Menu from which you may print any page you are authorized to view.
END	PF3	Returns you to the previous screen.
ME(Menu)	PF4	Returns you to the Viewing Menu.
RF(Repeat Find)	PF5	Searches all occurrences of the string of characters.
MA(Mark)	PF6	Marks pages for printing.
U (Up)	PF7	Moves the viewing window up.
D (Down)	PF8	Moves the viewing window down.
LE (Left)	PF10	Moves the viewing window to the left.
RI(Right)	PF11	Moves the viewing window to the right.
Q (Quit)	PF12	Exit from the Viewing and Printing system.
F (Find)	N/A	Searches forward for a string of up to 44 characters. This command can only be used once in a Report.
T (Top)		Moves the viewing window to the beginning of the report.
B (Bottom)	N/A	Moves the viewing window to the bottom of the report.
L(Locate)	N/A	Same as the Find except this command is used for all screens except when in a Report.

Further information on using the commands listed above can be found in the following sections.

How to Navigate Through a Report

Without changing the default fields, the window typically moves to the right or left half of the width of the screen at a time. Example: On an 80 column screen, the window moves 40 columns if scrolling to the right or left. The following describes how to easily navigate through a report.

9.1

Commands

Navigating through a report can be accomplished by entering any of the following commands in the **Command** field.

 RI(ght) –moves the screen to the right by the number of columns you specify.

To specify how many columns you wish to move to the right, on the Command line, enter RI and the number of columns you wish to move right (ex. RI 5 will move your screen to the right 5 columns).

 LE(ft) – moves the screen to the left by the number of columns you specify.

To specify how many columns you wish to move to the left, on the Command line, enter LE and the number of columns you wish to move to the left (ex. LE 5 will move your screen to the left 5 columns).

U(p) – moves the screen up by the number of rows you specify. This
command is the same as entering Row in the SCROLL field.

To specify how many rows you wish to move Up, enter U on the Command line and the number of rows and press enter.

D(own) – moves the screen down by the number of rows you specify.
 This command is the same as entering Row in the SCROLL field.

To specify how many rows you wish to move Down, enter D on the command line and the number of rows and press enter.

- **T**(op) to go to the first page of a report, enter a T on the Command line and press enter.
- **B**(ottom) to go to the last page of a report, enter a B on the Command line and press enter.

 L(ocate) – The Locate command is useful when trying to find a specific section of a report (ex. Agency Code/Reporting Unit). This command can only be used on the Report Section or Enterprise Index Topic Items screens. To locate a specific section, enter L and the string of data you are searching for.

Example: If you are in the Enterprise Index Topic Items screen for the Warrant Register report and you are trying to find Agency/Reporting Unit 051-220, enter L 051-220.

 F(ind) – The Find command is useful when trying to find specific information of a report (ex. Smith). This command is available once you are inside the report. To Find the specified information, enter F and the string of data you are searching for. Example: To find a record with the name Smith, enter F Smith.

With this command, you can also find all occurrences of specified data by entering the string requested (ex. F Smith) and press enter. After finding the first occurrence, press PF5 to repeat the Find.

Scrolling

Scrolling through a report is possible using a combination of PF keys and commands. Scrolling is accomplished by:

In the **SCROLL** field (on the command line to the far right) you have the option of scrolling by:

Screen – scrolls forward one screen at a time.

To scroll a screen at a time, change the SCROLL field to SCREEN and press PF8 (forward) or PF7 (back).

Page – scrolls forward one page at a time.

To scroll a page at a time, change the SCROLL field to Page and press PF8 (forward) or PF7 (back.)

Line – scrolls forward however many lines you designate.

To scroll through the report one line at a time, change the SCROLL field to Line and press PF8 (forward) or PF7 (back).

■ Row – same as line.

To scroll through the report one row at a time, change the SCROLL field to Row and press PF8 (forward) or PF7 (back.).

Printing Reports 10.0

ViewDirect users are limited to one printer. Printers can only be changed by contacting the ViewDirect Administrator. When changing a printer id, please provide the user id and printer identification number. If you are unsure whether your printer is a mainframe printer, please check with your IT staff for assistance.

Once the job is submitted for printing (per the instructions below), you will receive a message at the top of the screen indicating "Print Request Submitted". If you do not receive this message, try the following:

- 1. Make sure the printer is turned on.
- 2. Log all the way off of the system and log back in. Retry the print request.
- 3. If after trying numbers 1 and 2 above you are still unable to print, call the SCO Customer Service Help Desk (see attached contact list). Please be prepared to provide your user id and printer id.

The Printing Menu

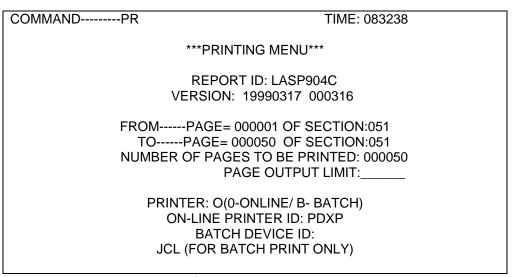


Figure 10.0

Once you submit a report for printing (as described below), you will be directed to the Printing Menu. Please note that all fields on this menu are pre-filled and you cannot enter data.

In ViewDirect, you have the option of printing the entire report or pages of a report. The following sections provide information on either option:

Printing the Entire Report

Once you are within the report, press PF2 and you will be directed to the Printing Menu. From this Menu, press enter and the entire report will be submitted to your printer.

Printing Portions of a Report

If you do not want to print the entire report (PF2 without one of the following commands prints the entire report), you can mark report pages for printing as follows:

- To print a specific number of pages, beginning on the current page you wish to print, on the command line enter MA(space)# (where # enter the number of pages you wish to print. Example: MA 6 will print the current page plus the following 5 pages). Press PF2 (print) and press enter to submit the print request.
- To print a entire section of a report, beginning on the first page of the section you wish to print, on the command line enter MA(space)S. Press PF2 (print) and press enter to submit the print request.
- To print a block of a data of a report, at the beginning of the block you wish to print, on the command line enter MA(space)B on the command line. Scroll forward to the end of the block of data you wish to print and enter MA(space)B again. Press PF2 (print) and press enter to submit the print request.

Contacts 11.0

ViewDirect Administrator (Personnel/Payroll) Jeanna Bowe, 322-3899

Contact the Personnel/Payroll ViewDirect Administrator for questions related to printer change requests, the ViewDirect procedures, problems viewing reports and problems logging on.

ViewDirect Administrator (Fiscal) Esther Setser, 324-2340

The Fiscal ViewDirect Administrator should be contacted for questions related to the Fiscal ViewDirect system.

Security Authorization Form, PSD125A SCO Security Administrator, Samantha Kelly, 322-3055

Contact the Security Adminstator for questions related to the Security Authorization form and security requirements.

CLAS Liaison Unit Support Staff, 327-0756

Contact the CLAS Liaison Unit for questions related to the data contained in any of the CLAS reports.

Payroll Liaison Unit Support Staff, 323-3081

Contact the Payroll Liaison Unit for questions related to the data contained in any of the Payroll reports.

Data Management Unit Joan Carda, 445-6688

For questions related to the Established Position and Potential Vacancy Reports.

SCO Customer Service Hotline, 324-6716

Contact the Customer Service Hotline for printing problems.

APPENDIXES

APPENDIX

Available Reports (R) in ViewDirect

BOMRPT1 -	Ronofit	Over May	with	CCNI
BUNKPII-	Beneiii	CWELWAX -	- WHIT	ンショ

BOMRPT2 - Benefit Over Max - without SSNs

LASP6565 – Leave Accounting Intermittent Benefit Tracking Report

LASP904C - Leave Activity & Balances - without SSNs

LASP906C – Leave Activity & Balances - with SSNs

PAYREGX - Report version of the Payroll Warrant Register Report

PCFY0403 – Probable Vacant Position Report

PCFY0404 – Abolished Vacant Position Report

PD-A/R – Notice of Accounts Receivable

PD-A/RVRSL – Notice of Accounts Receivable Reversal

PDBLKBAL – Blanket Balance Report

PDBLKMIC – Blanket Expenditure Report

PDB5474A - Retirement Maximum - Compensation Limit Reached

PDC9820 – W2's To Be Mailed

PDL4016 - Unused CTO Greater Than 9 Leave Periods

PDM0500 – Alpha Listing

PDM0501 – Facility Alpha Listing

PDP5711 – Suspended Transactions

PDV1101 – Estab. PSN by PSN Number

PDV1102 – Estab. PSN by Class Title and Psn

PDV1103 – Filled/Vacant PSN Summary by Facility and Class Title

PDV1104 – Dept. Summary Filled/Vacant PSN by Class

PDV1105 – Estab. PSN w/No Expenditures by Facility & Psn

PDV1106 – Estab. PSN w/No Expenditures by Facility

PDV1107 – PSN w/No Expenditure for 3, 4, or 5 mos. By Facility

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PDV1108 – PSN w/No Expenditure for 3, 4, or 5 mos. Dept. Summary

PDW5350 – PIP Payroll Transactions (Annual R & R)

PDW5352 – Employment History Summary (Annual R & R)

PDW5354 – Payment History Summary (Annual R & R)

PDW5355 – Payroll Overtime Transactions (Annual R & R)

PDW1579-1 – FLSA Exempt EE's Not Entitled to Pay – No Budget

PDW7170 – Employees Identified as Nonresident Aliens

PERIODIC – Periodic Position Control Report

PR1720-A – Suspended Payment Report

ROLL8WR - Roll Code 8 Warrant Register Report

Available **Topics** (T) in ViewDirect

ACTINDX - Daily Activity Index

ACTNDXA – Annual Activity Index

ACTNDXM – Monthly Activity Index

PAYREG – *Topic* version of the Payroll Warrant Register Report

PDAR_AU – *Topic* version of the Notice of Accounts Receivable by Agy/Rpt Unit

PDAR_CL - *Topic* version of the Notice of Accounts Receivable by Clearance Number

PDRV_AU – *Topic* version of the Notice of Accounts Receivable Reversal by Agy/Rpt Unit

PDRV_CL - *Topic* version of the Notice of Accounts Receivable Reversal by Clearance Number